FIVE STEPS TO CREATING AN EFFECTIVE SERVICE CATALOG

It is a popular belief that somewhere in the region 60% of IT projects fail to deliver the outcomes expected of them. Similarly, how many service catalogue initiatives fail to provide some or any of the expected benefits? Could the same statistic apply to service catalogue initiatives?

A catalogue of services, no matter how basic, is the cornerstone of IT service delivery. Yet, paradoxically, many IT organisations do not have their services defined and struggle to understand, let alone create a service catalogue that yields any benefit or value.

Service catalog mean many different things to many different people. However, most would agree that a catalog that helps customers and users to quickly identify the services they require clearly adds value. In turn this helps organisations identify key services that support business processes and understand the contribution they provide.

Failure To Show Value

The failure of IT to show its value to the organisation and its role in the achievement of business outcomes may leave IT vulnerable in the sense that it is seen as not being as strategically important to the organisation as other

business processes and functions. If IT fails to provide quality services that are required by the organisation, or even fails to cope with changing demands, IT may be viewed as a less important strategic asset in the organisation. Possibly this could lead to areas within IT, or IT itself, being downsized or even outsourced.

Show The Value Of IT

For IT to be fully successful, IT needs to be strategically aligned to the business and positioned as a key enabler in achieving successful outcomes. These outcomes should be aligned to supporting the organisations strategies. It is not enough for IT alone to consider itself successful at what it does.

IT needs to provide real value to the organisation that directly achieves the business outcomes. IT should be able to deal with the ever-changing needs and demands of the organisation and their customers.

IT should also be capable of demonstrating how it provides business value to the organisation which ensures that IT is positioned within the organisation as a core strategic asset.

So, with all this in mind, are you ready to uncover five steps that will ensure success with your service catalogue initiative and clearly show the value IT provides to the organisation?

Note: Chapter references throughout this article refer to my book “The Service Catalog. A Practitioner Guide” where additional details on the subjects discussed are available.

Step 1 Understand What The Service Catalogue Is

Basically there are two basic versions of service catalog. The first version is a record based or documented catalog of services. This catalogue provides information about the services provided. Basic information included in this type of catalog includes:

- Service name
- Service description
- Service attributes e.g. hours of operation, support details etc.
- Service owner
- Service status (providing a basic service portfolio)
- Service costs (though not always available or understood)

The above list is just a fraction of what information can be recorded in a service catalogue. Additional details of what information to record about services is provided in chapter two, section 2.5.

The key is to identify what information is relevant to your organisation and to understand how to populate, manage and keep this service information up to date. Typically this type of service catalogue can be presented in anything from a spreadsheet, a word document, on a web site or similar medium.

The second version of the service catalogue is a request-based catalogue also referred to as an actionable service catalogue. This catalogue allows users and customers select and consume services from an on-line portal or application and uses workflows and automation to process some, or all, of the request.

Sometimes this type of catalogue is an extension of a service management ticketing system especially within IT departments. Other times it is a separate service catalogue application for the specific purpose of allowing customer or end-user interaction in order to procure services or fulfil requests. Many software vendors promote and sell this type of service catalog.

Armed with the above information the fundamental question to ask is, “what version of service catalogue do we need”. This needs to be understood and clearly answered before moving on to step 2.

Step 2 Decide Which Type (Or View) Of Service Catalogue Is Needed.

There are different types of service catalogues that can exist. Another way of looking at this is that there are different views of service information which can be used for different purposes.

Eight typical types of service catalogue are represented in the following list.

- IT Service Catalogue
- Business Service Catalogue
- Customer Service Catalog
- Supplier Catalog
- Product Catalogue
- Professional Services Catalogue
- Business Actionable Catalogue
- Customer Actionable Catalogue

Chapter two provides the service portfolio pyramid which is unique to the book and visualises and explains these eight different service catalog types in detail.

However, this is not to say that all of these service catalogue types are all different or separate catalogues. The first six are the records based catalog. They could easily be represented within one records-based service catalogue framework, application or even spreadsheet.

Different views of a service catalogue can be set up to show information from different service catalogue types. A simple example is to use a pivot table to

show supplier information, a different pivot table to show the IT service catalogue etc. Each “view” or catalogue will show information pertinent to that catalogues purpose.

For example, the IT service catalogue shows an IT view of IT systems that make up IT services and, in some cases, can be related back to the CMDB and specific CI’s.

The business service catalogue shows clearly, and without technical jargon, services from a business perspective which are easily understood by the business. The billing of services within the organisation would be based on this, the business service catalogue, view of the services.

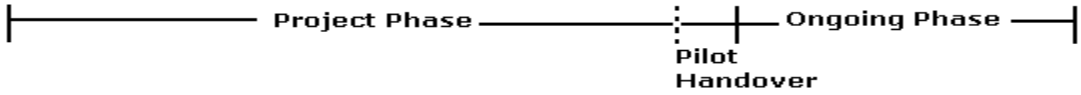
The last two in the above list are request based or actionable service catalogues and would generally be rendered via a web portal or software application. The business actionable service catalogue is internally facing to the organisation, while the customer actionable service catalogue is externally facing.

In addition it is likely that the user interface (UI) and the workflow configurations may differ significantly between the two.

Step 3 Use A Structured Approach

The old adage ‘failing to plan is planning to fail’ is just as relevant to any service catalogue initiative. As with any project, it is vital to plan the service catalogue initiative to ensure a successful outcome is achieved.

The following is a simple approach which contains two main phases consisting of a project phase and the on-going phase. Within these two phases there are four stages, three of which fall under the project phase and one that falls under the on-going phase.



Stages For Creating A Service Catalog

The stages for creating a service catalog are listed below and described in detail throughout chapter four. These stages can also be considered high level tasks within a project Work Breakdown Structure (WBS) when planning the service catalog initiative or project. This approach is not a substitute for formal project management principles but provides, at a high level, areas that should be included within the service catalogue project.

Initiation

- Develop a business case
- Undertake a feasibility study

- Establish the project charter
- Appoint the project team

Planning

- Create project plan
- Create financial plan
- Create risk plan
- Create requirements specification
- Create acceptance criteria
- Create procurement plan

Execution

- Design
- Build
- Test
- Evaluation

- Approve
- Deploy / Publish

Operations

- Pilot
- Handover
- Steady State
- Continual service improvement
- Audit and verification

Step 4 Built It, Test It, Release It

This step aligns to the execution stage. Before any effort is put into building a service catalog a thorough understanding of the requirements are needed, see planning stage in the previous section which includes creating a requirements specification.

If you don't define the requirements and fail to adequately design an effective and appropriate service catalog, the initiative is very likely to fail, waste money and yield no real benefits to the organisation.

Once designed, the service catalog should be tested to ensure that the functionality works as expected, especially from an end-user of customer perspective. Basically the service catalog should be fit for purpose and use with performance supported and constraints removed.

User acceptance testing (UAT) is a vital part of the overall testing approach and should be completed and signed off prior to general release.

Once released, there should be a period of ‘early life support’ for the service catalogue in order to support issues that may arise. This is particularly relevant for the request-based service catalogue as there are likely to be many workflows and customisations supporting the original requirements and working of the service catalog.

Step 5 Manage The Service Catalogue

This step aligns to the operations stage. It takes an abundance of coordination and effort in order to correctly design, implement, populate and update a descriptive service catalog and its various components.

However, it only takes very little time for any of the information in a service catalog to become old, out of date or obsolete. Therefore it is imperative to ensure that there are measures in place that are robust enough to ensure that all this information is kept valid, up to date and remain relevant to the needs of the organisation.

To some it is seen that strong governance of the service catalog is required. In reality what is required is strong management of the service catalog. The service catalog is only as up to date as the last update that was made to them. Strict management practices are required.

So another process or sub-process is required in order to manage keeping the service catalog up to date, relevant, accurate, useful and representative of the true state of all services in the organisation.

ITIL 2011 contains a process called service catalog management within the service design book. The goal of this process is to “ensure that the service catalogue is produced and maintained containing accurate information on all services throughout the service lifecycle”.

Every organisation should develop processes and supporting documentation that is fit for their individual purpose and use which also aligns to the needs and outcomes of the organisation.

Regardless of the process template and format used, which differs from one organisation to another, there are typical elements that would be expected to be found in a documented process.

With this in mind, the process should include the following sections, which are explained in chapter six:

- Scope and objectives
- Process flow

- Process narrative
- Roles and responsibilities
- Appendices (including supporting information)

While procedure and work instruction documents are to be considered part of the overall process, they are separate documents in their own right and are as important in support of the execution of the process.

In summary, creating an effective service catalogue is not a trivial undertaking, regardless of the type of catalogue required. Don't let your organisation's service catalog initiative be one of those IT projects that fail. Aim for success and arm yourself with the information required to deliver a successful service catalogue.

Further details are available in my book "The Service Catalog" which is published by Van Haren Publishing and is available through online bookstores.

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